

# **Study on electromobility in the German fleet market**

July 2026



# Executive Summary

The electrification of corporate fleets is increasingly advancing. To support this process through regulation, in November 2025 the European Commission presented the Clean Corporate Vehicles Regulation (CCVR). It sets electrification targets for large companies in Europe (more than 250 employees and €50 million in revenue). Germany's target is 54% zero-emission registrations by 2030 and 95% by 2035. The legislative process is expected to conclude by the end of 2026 at the latest. Against this backdrop, this study provides an overview of the state of electromobility in the German fleet market.

## Key findings

- **The electrification of company fleets in Germany is advancing very fast. With 30% of new registrations, electric vehicles in the first half of 2026 ranked first** ahead of all other powertrains for the first time. 94% of large companies (50+ vehicles) already have one or more electric vehicles in their fleet.
- **Two-thirds of large companies (50+ vehicles) think it likely they will be driving almost emissions-free by 2035.**
- **A clear majority of 61% of respondents want Germany to play a pioneering role in electrifying corporate vehicles.**
- At the same time, incentives and regulation add pace. Without subsidies and regulation, 54% of companies would electrify more slowly or not at all.
- **For 74% of fleet managers with electric vehicles, cost-effectiveness was the decisive driver for electrification. 59% of all fleet managers rate it better for electric vehicles than for cars with combustion engines.**
- Carmakers belonging to German groups account for 73% of the electric vehicles newly registered in the fleet market in the first half of 2026. Models of the VW brand in particular are in strong demand.
- New brands, particularly from China, could nonetheless change the fleet market. 73% of respondents think new car brands such as BYD or Xpeng are equal to or better than German brands.

# Glossary

**BEV (Battery Electric Vehicle)**

A purely battery-electric vehicle with no combustion engine.

**CCVR (Clean Corporate Vehicles Regulation)**

EU regulation (proposal, as of 2025) setting binding electrification targets for large corporate fleets.

**CO2 targets / CO2 requirements**

Regulatory limits on the average CO2 emissions of vehicle fleets that manufacturers or companies must meet.

**Company car**

A company vehicle that employees are also allowed to use privately.

**Electrification (of the fleet)**

Switching vehicles from combustion engines to electric powertrains.

**Zero-emission vehicles**

Vehicles with no local CO2 emissions in operation (e.g. BEVs).

**Fleet**

All of a company's vehicles.

**Fleet manager**

The person responsible for procuring, operating and setting the strategy for company vehicles.

**IRIS®**

Dataforce database of vehicle registrations, based on the full census of the KBA.

**Fuel types**

Distinction between powertrain types, e.g. diesel, petrol, electric, plug-in hybrid.

**Federal Motor Transport Authority (KBA)**

The German federal authority that, among other things, compiles vehicle-registration statistics.

**Charging infrastructure**

All charging options for electric vehicles (public and private).

**Lease rate**

The monthly payment for the use of a vehicle under a lease.

**New registration**

The first-time registration of a vehicle for road use.

**OEM (Original Equipment Manufacturer)**

Vehicle manufacturer (e.g. VW, BMW, Mercedes-Benz).

**Plug-in hybrid (PHEV)**

A hybrid vehicle with external charging and a limited electric range.

**Q1 (first quarter)**

The first quarter of a year (January–March).

**Range**

The distance a vehicle can cover on one tank or battery charge.

**Relevant fleet market**

The market segment of commercial vehicle registrations by corporate fleets. Delimited from special commercial effects (manufacturer/dealer registrations, car-rental business).

**Fast charging / fast-charging infrastructure**

Charging at high power (e.g. DC charging) that enables much shorter charging times.

**TCO (Total Cost of Ownership)**

The total cost of a vehicle over its service life (purchase, operation, maintenance, energy, taxes, etc.).

**Combustion vehicle / combustion engine**

A vehicle with an engine that burns fossil fuels such as petrol or diesel.

**Registration share**

The share of a powertrain type/brand, etc. in all new registrations over a defined period.

# Electromobility in the German fleet market

## Methodology & data sources

This study focuses on passenger cars in German company fleets; alongside purely commercial vehicles, this also includes company cars that may be used privately. Excluded are registrations by car-rental firms, the car trade and manufacturers' own self-registrations.

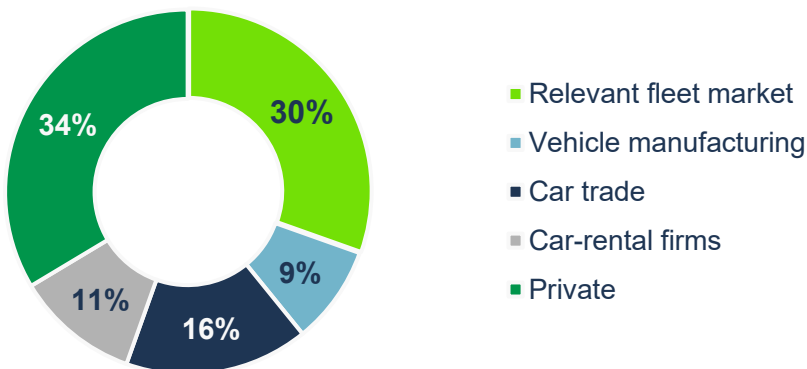
For this study, a combination of two data sources was used.

### I. IRIS® passenger-car new-registration data

IRIS® contains data from the Federal Motor Transport Authority (KBA) at a statistical level. The data is based on a collaboration between the KBA and Dataforce that has existed since 1998. Because vehicle registration is mandatory, the data constitutes a full census.

Dataforce divides the car market into privately and commercially registered vehicles. Within commercial registrations, a further distinction can be made between the vehicle-manufacturing, car-trade, car-rental and relevant-fleet-market segments. This study focuses exclusively on the relevant fleet market.

Distribution of new registrations 2025



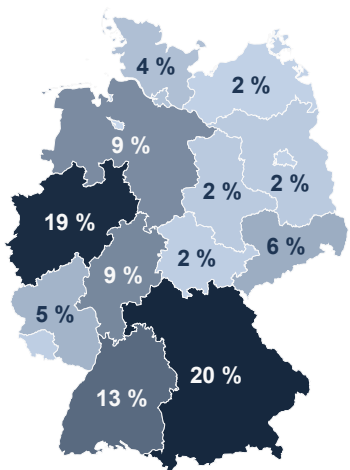
### II. Fleet-manager survey

The survey was conducted online from 16 to 28 April 2026. In total, 255 fleet managers from German companies took part and shared their views on electromobility.

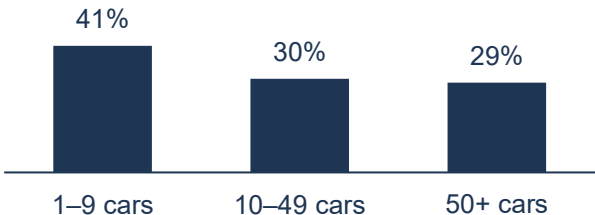
It covered both companies that already have electric vehicles in their fleet (n=171) and companies that have so far relied exclusively on combustion engines (n=84).

Composition of the sample:

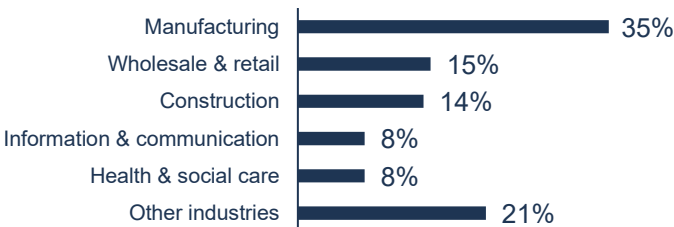
Company locations



Fleet size classes

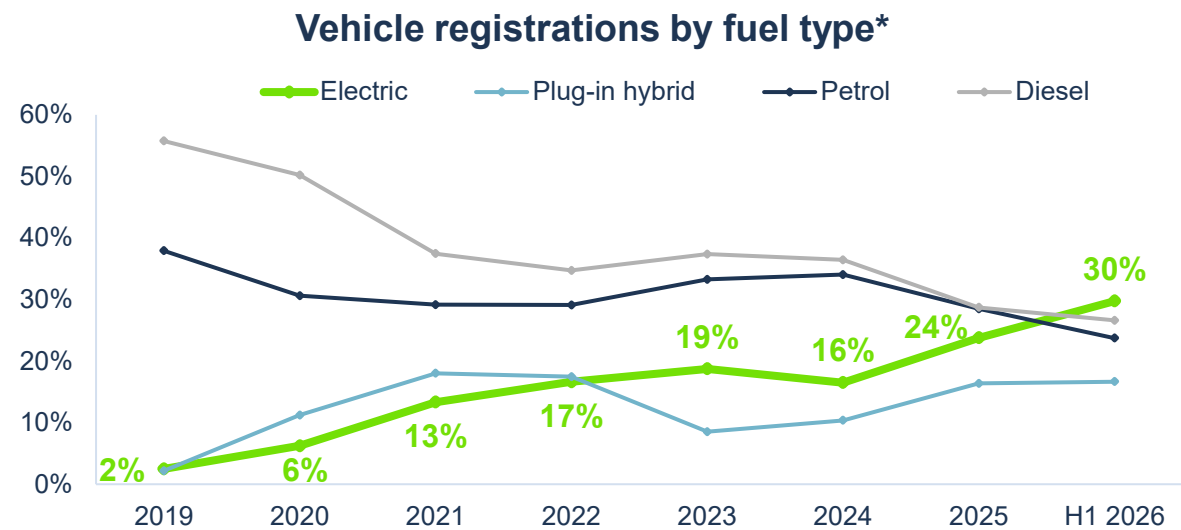


Industries



# Electric registrations lead the German fleet market for the first time in 2026

Fuel-type shares of passenger-car new registrations in the relevant fleet market, 2019 to H1 2026 | Fleets with electric vehicles, 2026 vs. 2030

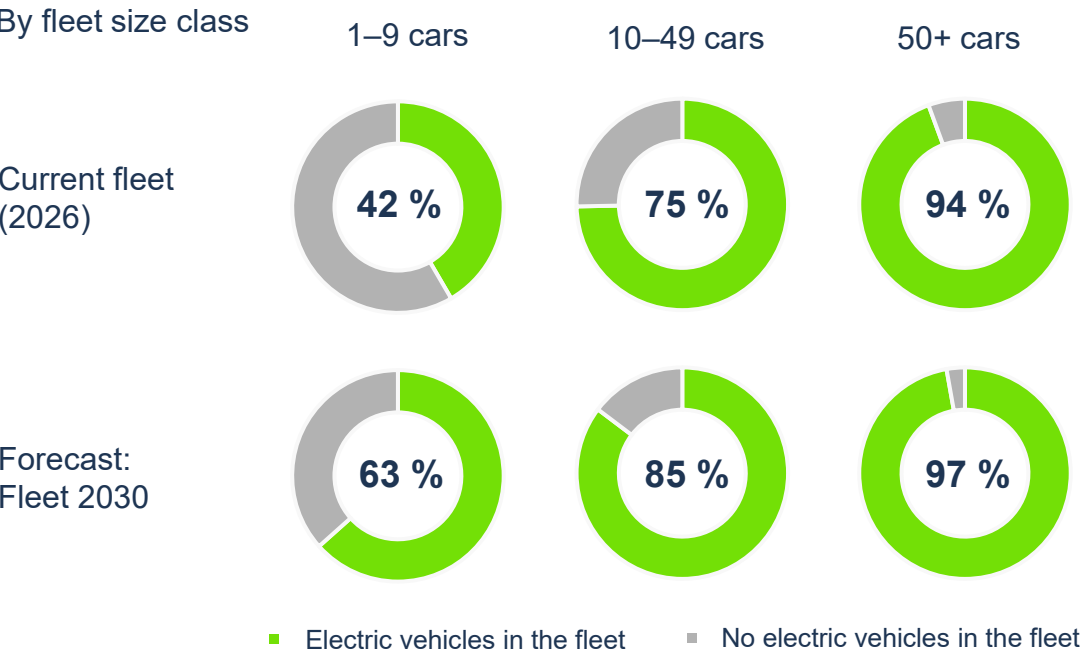


Diesel – five years ago still the dominant fuel in German fleets – is steadily losing market share due to high fuel costs, tax burdens and driving bans. Petrol cars are also declining, if less sharply; but as electrification advances, they too lose significant ground.

Since 2020, the share of electric new registrations in the relevant fleet market has risen continuously. In the first quarter of 2026 it led all other fuel types for the first time, and the lead widened in the second quarter. Dataforce expects this trend to continue over the full year and electric vehicles to become the dominant powertrain. Drivers of this development include a sharply expanded model range – from affordable entry-level cars to specialised business models with over 600 km of range and 800-volt fast charging – as well as increasingly better charging infrastructure.

\* For readability, other fuel types are not shown.

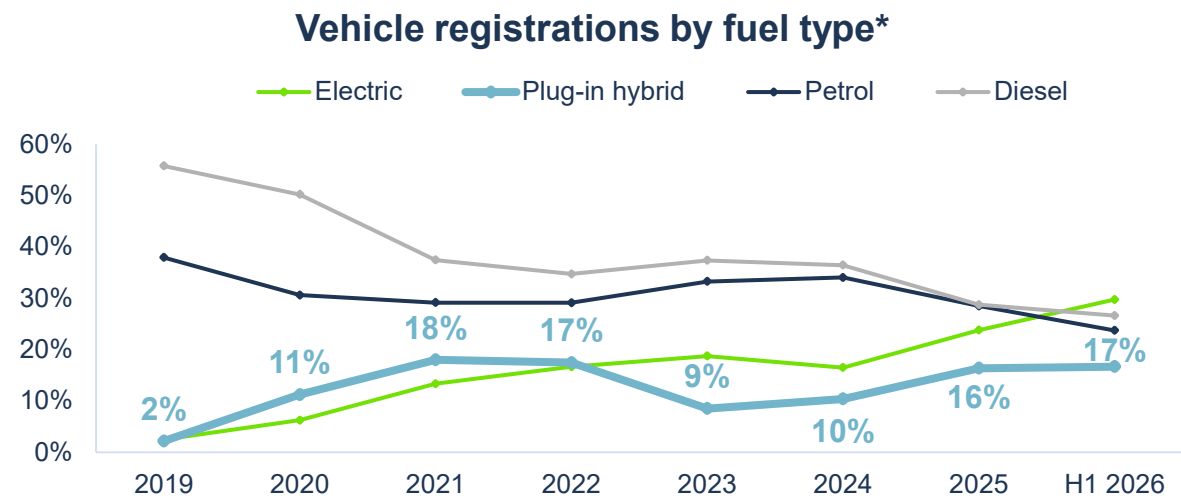
## How many fleets have at least one electric vehicle?



Already today, almost all large fleets have electric vehicles. By 2030 the majority of smaller fleets also plan to integrate them.

# Plug-in hybrids in the fleet market: peak reached, decline emerging

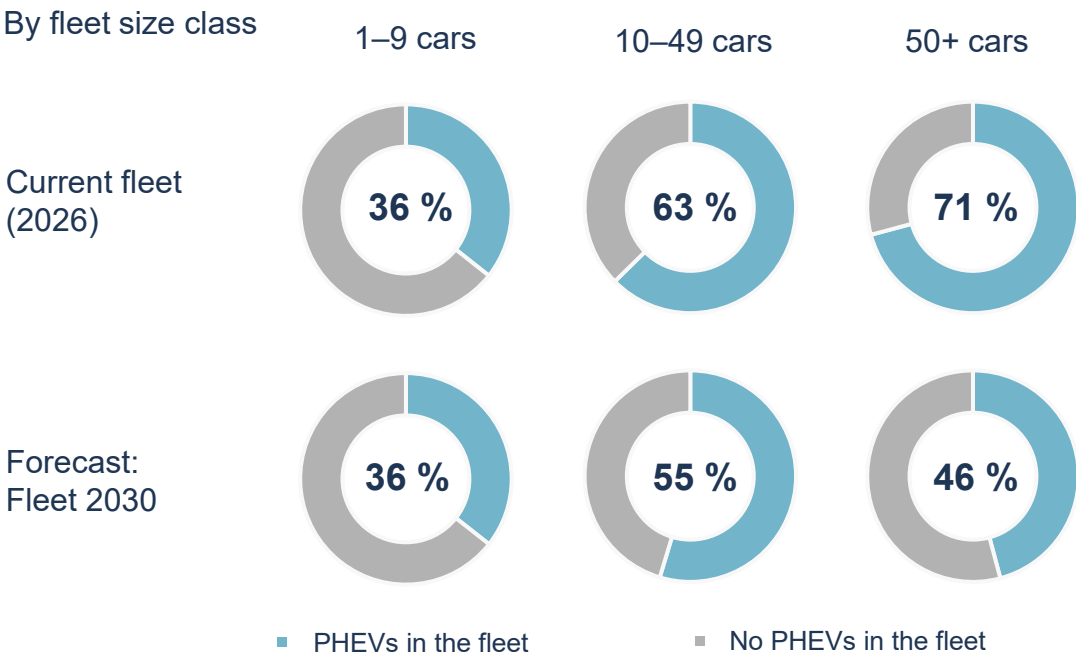
Fuel-type shares of passenger-car new registrations in the relevant fleet market, 2019 to H1 2026 | Fleets with plug-in hybrids, 2026 vs. 2030



Plug-in hybrids (PHEVs) are driven above all by regulatory requirements. Tax advantages for company-car drivers make them very attractive, especially in fleets. However, the peak in registrations for this fuel type has probably already been reached; the coming years are more likely to bring stagnation and, in time, a decline – particularly if subsidy conditions change. Even so, plug-in hybrids remain an important tool for manufacturers to meet their CO2 targets in the short term.

In actual use, plug-in hybrids often come with higher fuel costs, because with little or no electric use they are run more in fuel-intensive combustion mode. This erodes their economic advantage in many usage profiles, especially in fleet operation.

## How many fleets already have at least one PHEV?

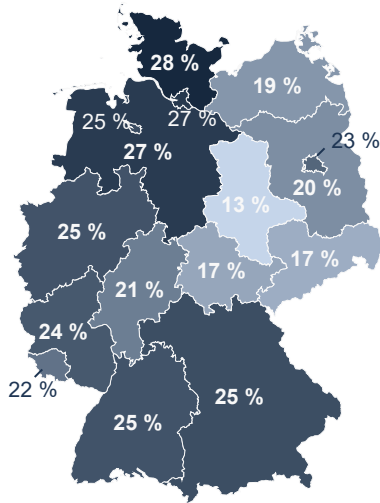


Plug-in hybrids are becoming less popular in fleets. They are currently still present in 54% of fleets, but many fleet managers plan to reduce them in many areas. This trend is especially clear in large fleets: while 71% currently have plug-in hybrids, only 46% still plan to by 2030.

\* For readability, other fuel types are not shown.

# Electric shares: comparison across federal states, internationally and private vs. fleet

Electric share of new registrations 2025



## Electric share by federal state

Overall, the electric share in the relevant fleet market was 24% in 2025. Looking at individual federal states, the east of Germany in particular lies below average. One reason is the slower roll-out of charging infrastructure in rural areas and lower purchasing power.

Federal states with high population density tend to have a higher electric share. But the highest electric share, in both 2025 and 2026, is found in Schleswig-Holstein.

## The relevant fleet market in international comparison



24 %

In France, electrification of the fleet market started somewhat more slowly than in Germany. While Germany already recorded double-digit electric shares in 2021, for example, the share in France was only 7%. However, France's electric share is growing dynamically, so that both countries reach just under a quarter of electric new registrations in 2025. Looking at the first quarter of 2026, France even ranks ahead of Germany on the BEV share.



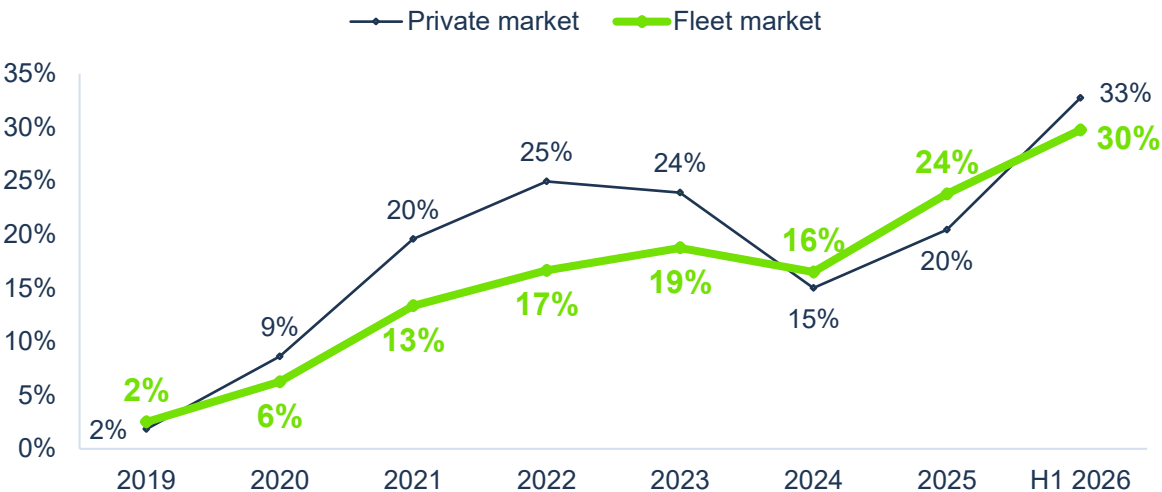
24 %



9 %

In Spain, the electrification rate – as in many other southern countries – is well below Germany's. At the start of 2026, too, the electric share, at 9%, is only slightly above the previous year.

## Comparison with the private market



In recent years the private market has been subject to far sharper swings in the electric share. While companies tend to plan for the long term, many private buyers deliberately used state subsidies for new-car purchases until 2023. When these incentives ended, there was a sharp slump in 2024.

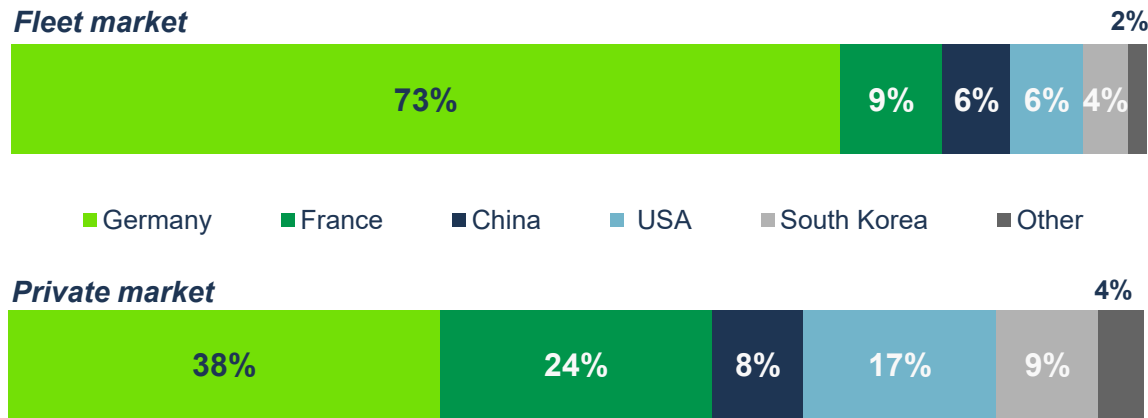
After a recovery in 2025, the share rose sharply in the first half of 2026. The newly introduced purchase premium is having an effect, as is the growing availability of cheaper electric models and the ongoing expansion of fast-charging infrastructure. In June 2026 an electric share of over 40% was achieved for only the second time ever. For the first six months of 2026 it stands at 33%.

In absolute terms, electric new registrations in 2025 were at a comparable level in the private and fleet markets (around 200,000 vehicles each). In the first half of 2026, private-customer volume, at just under 167,000, is again significantly higher than in the fleet market (123,000 electric new registrations).

# 3 in 4 fleet-market new registrations come from German-group manufacturers

Electric new registrations by group nationality | Attitudes towards “new” brands

New registrations by country of the group  
H1 2026



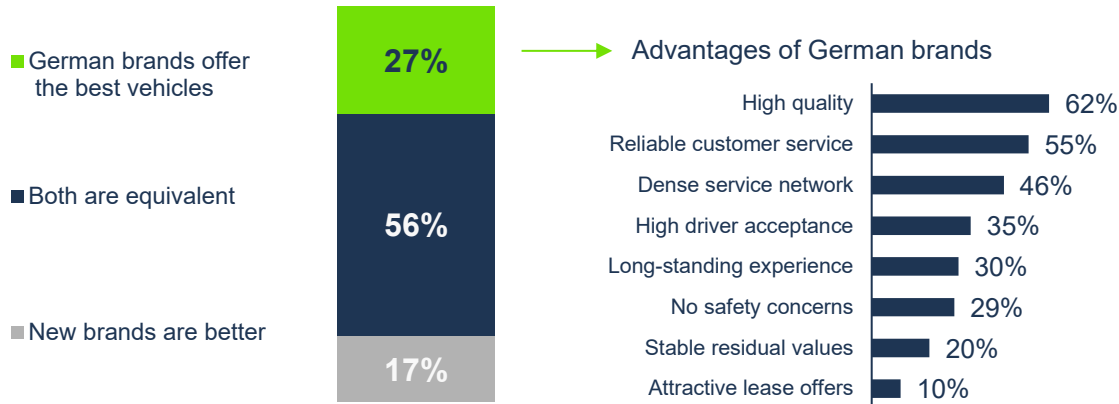
Manufacturers belonging to German groups dominate the fleet market in Germany. The VW Group, BMW and Mercedes account by far for the most registrations from German groups. Since 2023 their market share has risen sharply (57% → 73%).

France follows in 2nd place, owing above all to the combination of brands under Stellantis, which is assigned to France here. But Renault and Dacia also secure a large share.

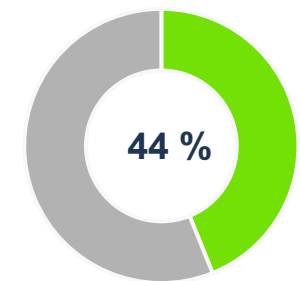
Chinese groups already play a role with 6% of the relevant fleet market. The drivers are above all Volvo and Polestar, which belong to the Geely group. Other important brands are BYD, MG and Xpeng.

Compared with the private market, manufacturers from German groups enjoy a very dominant position in the fleet market. While 54% of all new registrations in the private market were still attributable to German-group manufacturers in 2025, in the first half of 2026 the figure is as low as 38%.

Attitudes towards “new” brands with regard to electric vehicles



## Can you imagine integrating new brands such as BYD or Xpeng into your fleet in future?



Almost half of companies can imagine integrating new, Chinese brands into their fleet in future.

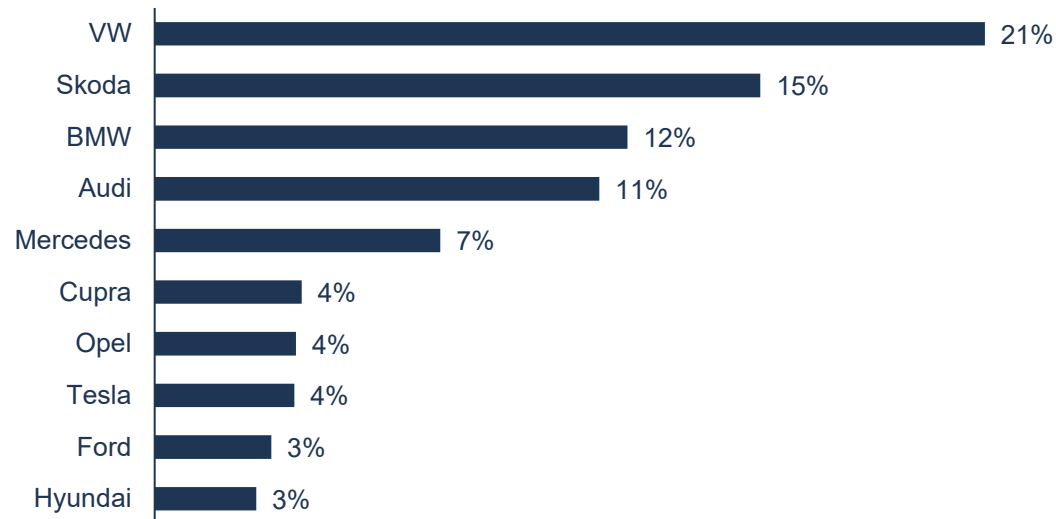
Smaller fleets of up to 9 cars are more sceptical; here approval is only 34%.

The difference is especially pronounced between companies that already have an electric vehicle in their fleet: here 48% can imagine a Chinese brand, compared with only 37% at companies without electric vehicles.

# VW dominates electric registrations

Top 10 electric brands / models among electric new registrations in the relevant fleet market, first half of 2026

## Top 10 electric brands, H1 2026



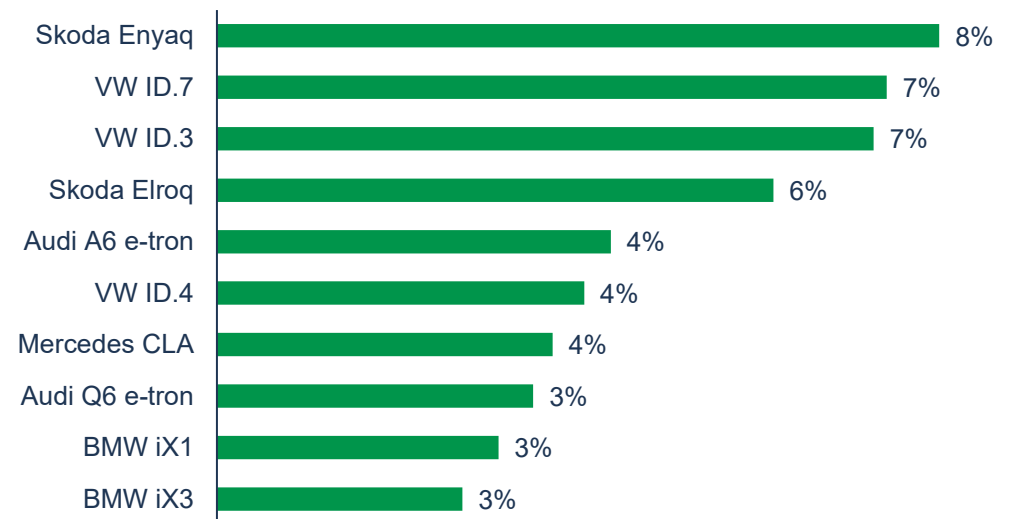
The top 6 brands in electric new registrations in the fleet market are held by German-group manufacturers. Opel – as part of the Stellantis group – follows in 7th place as the best-placed international provider.

VW holds the top position clearly – not only in the fleet market overall, but also in electric registrations, with a share of 21%.

Behind it, Skoda has climbed to 2nd place thanks to the sustained success of the Enyaq and the smaller newcomer Elroq. Skoda thus ranks ahead of the German premium competitors BMW, Audi and Mercedes.

Overall, in the first half of 2026 there are no new brands in the electric top 10 compared with 2025.

## Top 10 electric models, H1 2026



VW supplies 2 of the top 3 models in the relevant fleet market. Overall, the top 10 contains exclusively German-group manufacturers. The best-placed vehicle from a foreign group, Tesla's Model Y, takes 12th place.

The highest-volume model outside the VW Group is the Mercedes CLA EQ, launched in autumn 2025, in 7th place. Behind another Audi model, the Q6 e-tron, BMW completes the top 10 with its two SUV models, the iX1 and iX3.

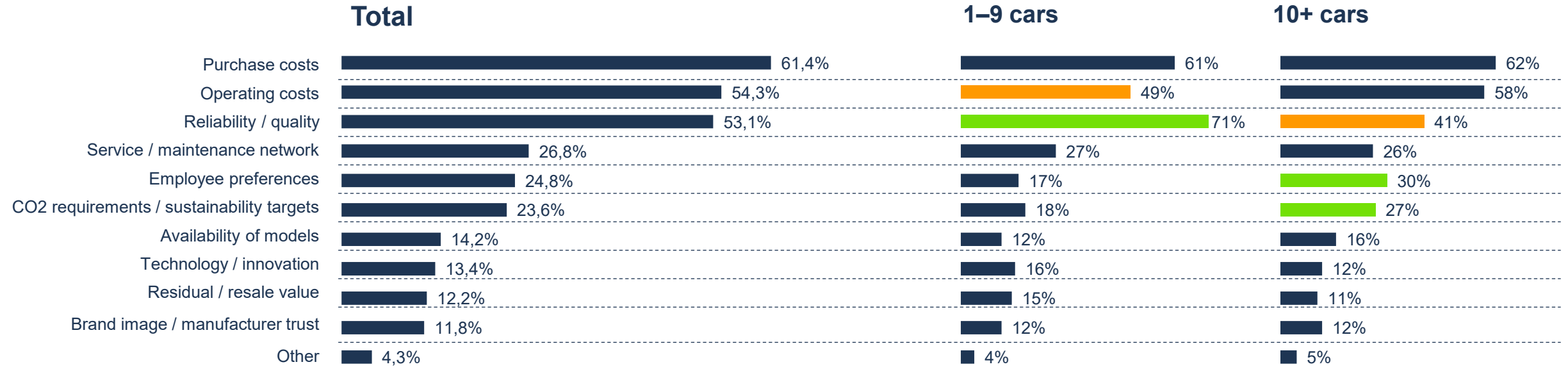
The model range will be expanded further over the course of the year. Here, too, the VW Group plays an important role, with launches such as the Cupra Raval, Skoda Epiq and VW ID.Polo. But Hyundai, KIA and Toyota are also lining up new models.

# Purchase and operating costs are the most important criteria for companies

## Criteria when purchasing vehicles

### Which criteria are currently decisive for companies when procuring vehicles?

Top 3 mentions



Besides pure cost aspects, fleet managers value reliability and quality in their vehicles above all. Small fleets in particular, which depend on their few vehicles, cite this even ahead of cost as the most important purchasing criterion.

After the top 3 criteria comes a reliable service and maintenance network. Fleet managers at large and small companies agree that this is an important factor in vehicle choice. It is one reason why new Chinese manufacturers still have a hard time in the German fleet market: issues such as the dealer network and responsible workshops are not yet comprehensively solved, so companies are happy to keep relying on established brands.

CO2 requirements and sustainability targets are kept in view above all by medium-sized and larger companies when purchasing. 27% of respondents said they pay attention to this as one of their top 3 criteria.

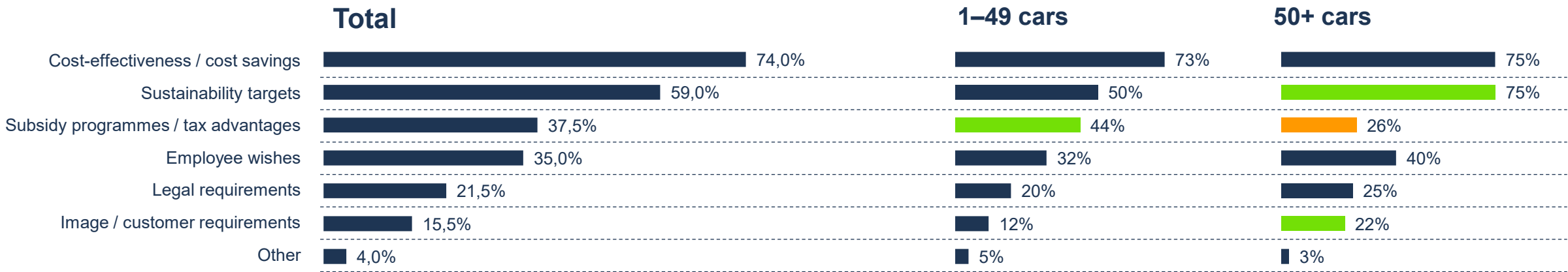
green = above average; orange = below average

# Companies are convinced above all by cost-effectiveness

## Drivers of electrification

### What are the most important drivers for electrifying fleets?

Multiple answers; fleets with electric vehicles in the fleet or acquisition planned

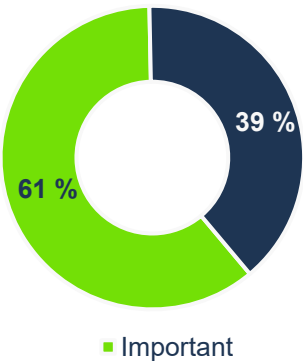


When procuring vehicles, companies focus above all on purchase and operating costs – so it is no surprise that the driver for electrification is, above all, cost-effectiveness. Companies need to see financial incentives to switch their fleet away from combustion engines. The rise in fuel prices in recent months should provide a further financial incentive to switch.

Sustainability targets, however, also play an important role, especially in large companies. Many companies have already set themselves the goal of becoming climate-neutral by a certain date and align their vehicle planning accordingly – even when it is not always the cheapest route.

While large companies tend to plan for the long term, subsidy programmes or tax advantages appeal above all to small and medium-sized companies. Large companies also partly opt for electromobility to present a positive image.

### How important do you think it is for German companies to be pioneers in electromobility? All respondents



More than 60% of fleet managers are convinced that German companies should take a pioneering role in electromobility. Among large companies with 50+ cars, as many as 74% hold this view.

Even 41% of companies that do not yet have an electric vehicle in their fleet still believe companies should lead by example here.

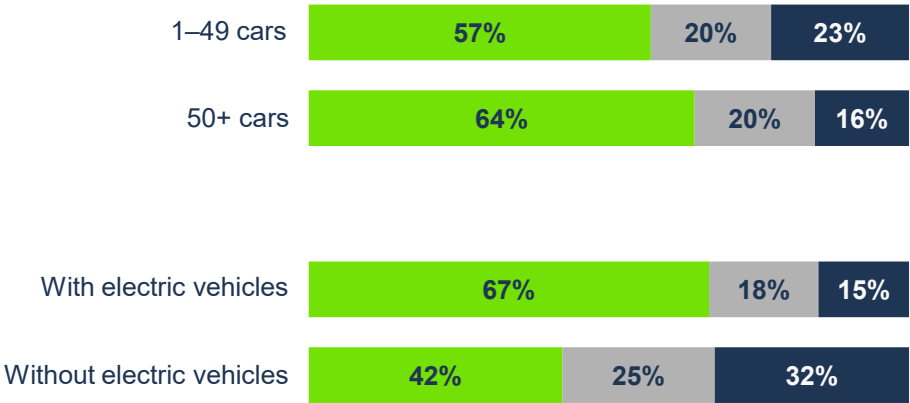
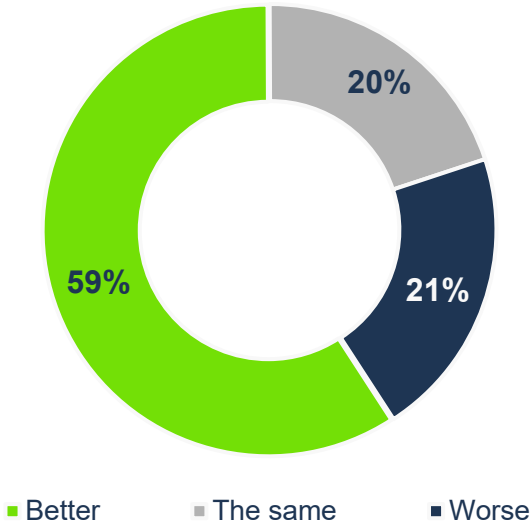
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# More than half are already convinced of the cost-effectiveness of electric

## Cost-effectiveness of electric vehicles

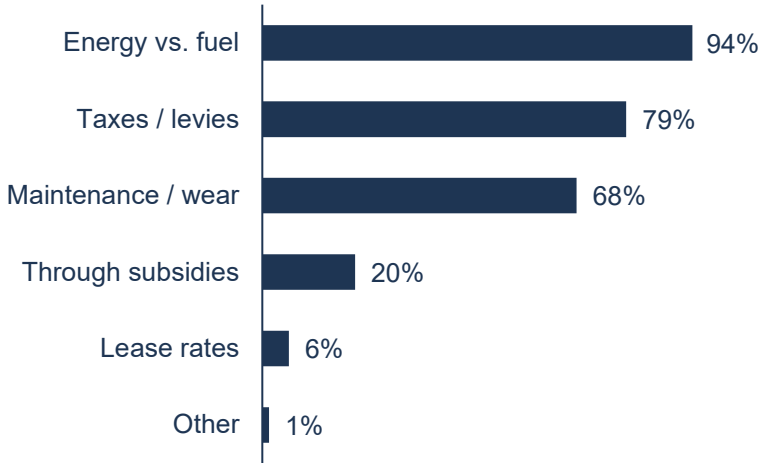
### How is the cost-effectiveness of electric vehicles rated compared with combustion engines?

All respondents, n=235



### In which areas do cost advantages arise?

Multiple answers, n=139



Cost factors play a central role – both in purchasing and in day-to-day operation. But how do fleet managers rate the total cost of ownership (TCO) of electric cars compared with combustion vehicles? Despite slightly higher vehicle prices, well over half are convinced that electric cars are the cheaper solution overall. Only about one in five sees combustion engines as the better option.

In large companies, which carry out comprehensive TCO assessments far more often, the share of those who consider electric vehicles more cost-effective rises to as much as 64%. Companies that have already gained experience with electromobility also rate cost-effectiveness more favourably.

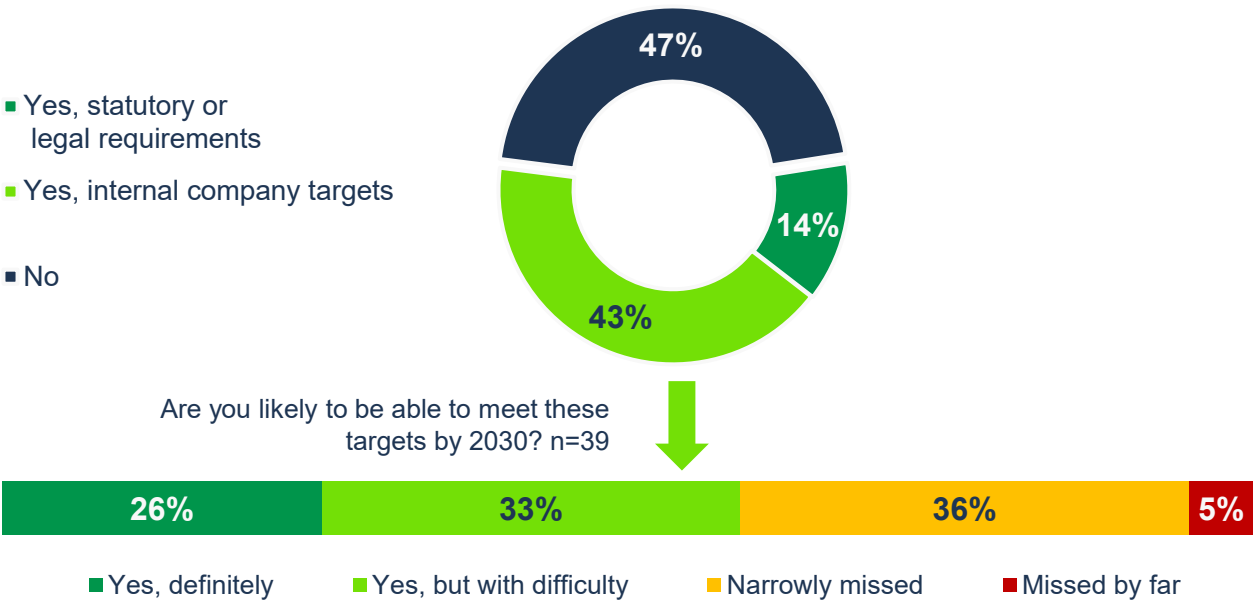
The biggest advantage is seen above all in fuel-cost savings – many companies now also have their own photovoltaic systems and thereby save even more. Tax advantages are also highlighted, as are lower maintenance and wear costs.

# Large companies already set themselves environmental targets – and can meet them

## Environmental requirements and targets for companies with at least 50 cars

### How many fleets must meet environmental requirements or targets by 2030?

Only fleets with at least 50 cars, n=74



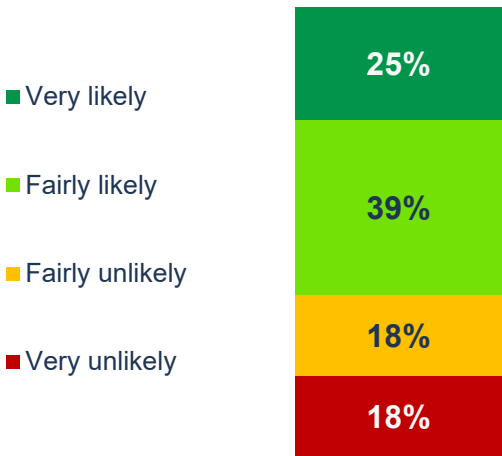
More than half of companies with at least 50 cars must meet environmental requirements or targets. However, only 14% involve statutory requirements; 43% have set themselves targets internally. Thus just under 4% of companies have both statutory requirements and internal targets.

About three-quarters of fleets aim above all at a clear reduction in CO2 emissions. Just under a quarter already plan to become fully climate-neutral by a certain date. The plans range across target dates from 2030 to 2040.

About 60% of fleets expect to be able to meet their targets by 2030. 36% expect to miss them only narrowly and thus to be quite close to fulfilment. This means 95% of fleets will either meet their targets or miss them only narrowly. Only 5% expect to miss them by a wide margin.

### How likely is it that, from 2035, you will procure exclusively (at least 95%) emissions-free passenger cars?

Only fleets with at least 50 cars, n=72



Looking at full climate neutrality, a clear majority of larger corporate fleets consider the switch realistic: almost two-thirds expect to procure predominantly (at least 95%) emissions-free vehicles from 2035.

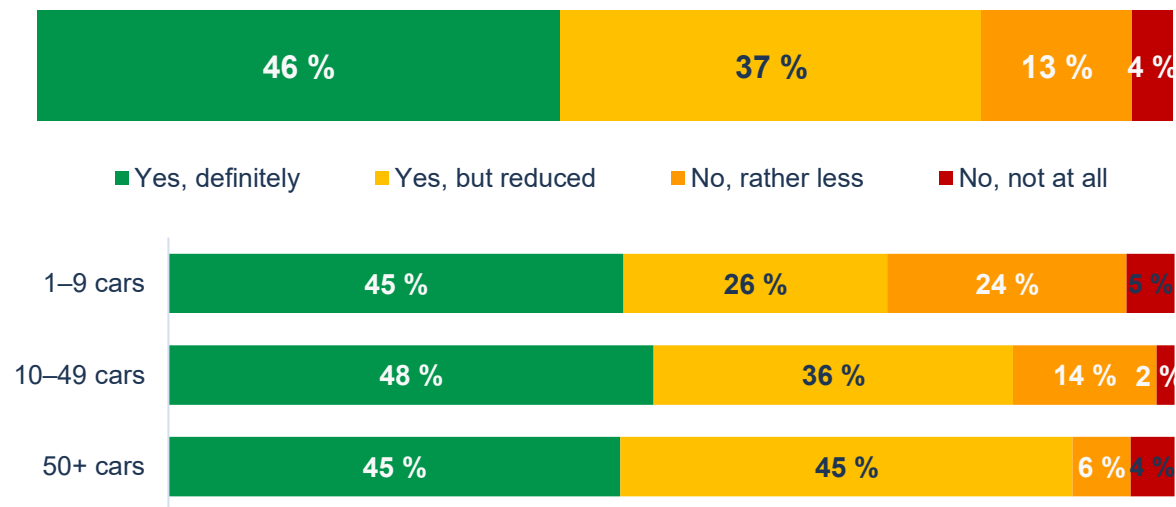
Against this stands only a small group of 18% who are strongly pessimistic and consider the switch to almost exclusively emissions-free vehicles by 2035 very unlikely.

# 54% would slow or stop their electrification without regulation

## Relevance of subsidies and policy measures

### Would companies continue electrifying even without additional subsidies and regulation?

Only fleets with electric vehicles in the fleet, n=167

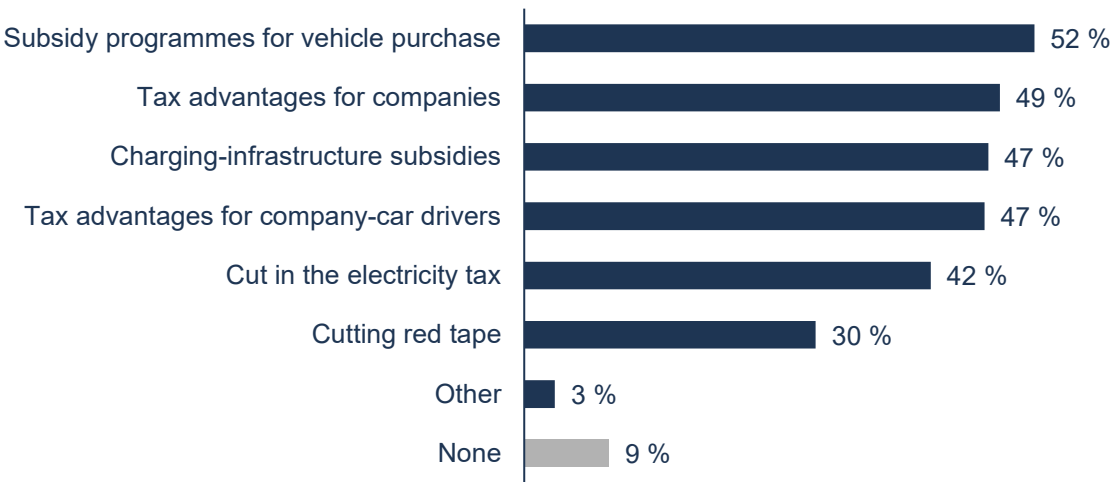


Only just under half of companies say they would continue their current electrification strategy even without state subsidies or regulation. A further 37% would do so only in a weakened form without incentives. 17% would even scale back significantly or abandon electrification entirely.

State requirements therefore remain a decisive driver for convincing companies of electromobility in the long term. This effect is especially strong in small companies, where 29% of respondents say they make a great deal depend on regulation and subsidies.

### Which policy measures have the greatest influence on electrification, from the fleet managers' perspective?

Multiple answers, all respondents, n=255



There is no clear winner among the subsidy options for fleet managers. 52% consider financial grants for vehicle purchases important, but tax advantages – for companies as well as for company-car drivers – and support for expanding charging infrastructure are also considered important by around half of fleet managers.

A cut in the electricity tax could also give electrification another boost, especially combined with the sharply risen fuel prices. In addition, investment in a better power grid is decisive in order to meet companies' increased capacity requirements.

# Route adjustments and range remain the strongest counterarguments

## Barriers to introducing electric vehicles

### What speaks against electric vehicles in the fleet?

Ranking, fleets without electric cars, n=84

1. Range / route adjustments
2. **Cost factors**
3. Charging times in everyday operation
4. Acceptance by management
5. Charging at public locations

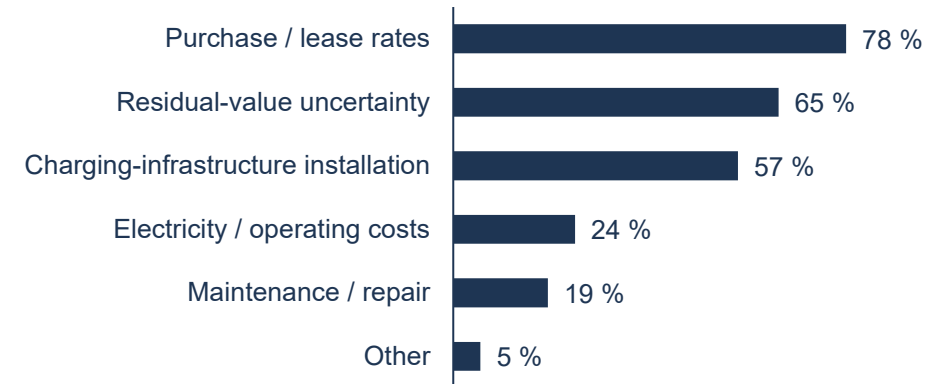
For fleets with electric vehicles and companies without them alike, the topic of vehicle range plays a major role. Although ranges have risen sharply in recent years and many models now exceed 500 km, the fear of an empty battery persists.

In many companies, however, this concern is rather unfounded: daily mileage is in most cases well below the range. Only a few high-mileage drivers will have to charge daily on their routes. Here, too, the marked improvement in charging technology helps, allowing newer models to be charged far more efficiently and therefore more quickly.

Until the end of 2023, company fleets could benefit from purchase premiums for electric vehicles. After the subsidies ended, electric vehicles were initially significantly more expensive again than combustion vehicles, and lease rates fluctuated depending on the offer. For companies that operate economically, this can be a disruptive factor when introducing electromobility.

### Which cost factors exactly?

Multiple answers, n=37



Vehicle prices and lease rates are the biggest cost factor that companies must solve in order to integrate electric vehicles into the fleet. While companies without electric vehicles tend to raise high purchase costs, companies with electric vehicles cite high lease rates as a barrier.

Surprisingly, uncertainty about residual values ranks 2nd among the cost factors, even though this factor cannot be clearly quantified. It is nevertheless a clear sign that companies hesitate when planning certainty is lacking.

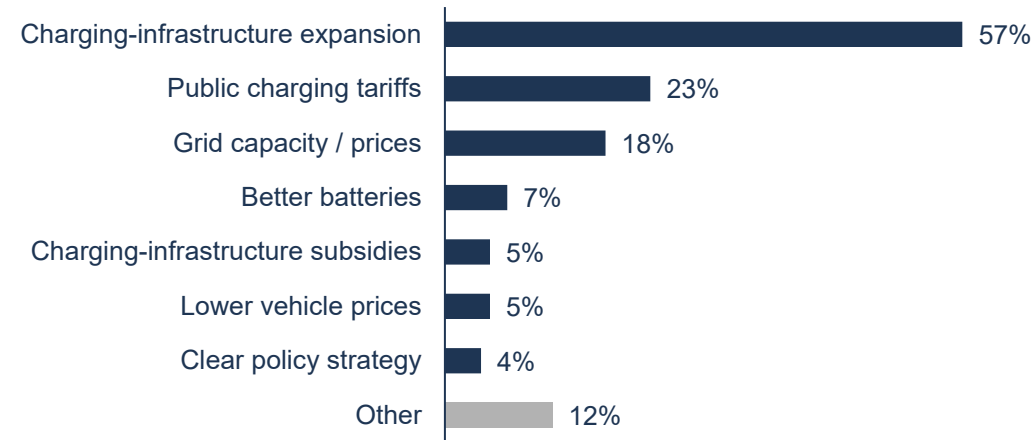
The third major cost factor is installing charging infrastructure on the company premises. Large companies in particular, which need many charging points at once, see this as a major challenge.

# Fast charging infrastructure and price transparency demanded

## Measures for fast electrification

### What would need to be improved, in policy or infrastructure terms, to further accelerate the switch to electric vehicles?

Open question, n=101



The improvement most frequently mentioned spontaneously by fleet managers is a further expansion of charging infrastructure. This is not only about quantity but, above all, about the quality of charging stations – i.e. fast-charging points. The option to install charging at rented apartments or private parking spaces is also mentioned.

The second most frequently mentioned is the “charging-card jungle” – the lack of transparency in public charging. Many criticisms feed into this, including excessively high prices, opaque costs and the confusion over which payment method to use at a given station.

Many also cite the power grid as a problem. Companies receive refusals from electricity providers and have no way to provide higher charging capacity.

### Quotes

- »» “Above all, the charging network should be expanded – not only in quantity but also in quality, so that faster charging is possible.”
- »» “Legal foundations should be created so that, as a tenant with a parking space, it is easier to set up a charging option. Either strengthen tenants’ rights or create incentives for landlords.”  
“A massive innovation in charging infrastructure. In our case: an old development with correspondingly old power-cable infrastructure. There are local substations in the apartment blocks, but even if we had charging stations, the cables wouldn’t withstand the extra load.”
- »» “Better transparency on costs at public charging stations and uniform electricity prices.”
- »» “The confusing proliferation of charging-card providers and opaque pricing puts many users off. At every charging station the price per kilowatt-hour should be clearly displayed, as at petrol stations. And payment should be possible with all common cashless means, without forcing a contract.”
- »» “It cannot be that I pay different prices for the same electricity at a charging station – depending on which card or app I use. Nor should card payment be more expensive than some roaming tariff. Charging has to work as transparently and uniformly as filling up.”
- »» “Cut the electricity tax and provide power at attractive prices – then no subsidy programmes are needed either.”
- »» “A clear political commitment to the climate targets. The back-and-forth is difficult for long-term investment and creates uncertainty.”
- »»
- »»



**MICHAEL GERGEN**

Senior Customer Services Specialist

+49 69 95930 231

+49 163 5939190

michael.gergen@dataforce.de



**SVENJA GEISS**

Manager Market Research

+49 163 5939190

svenja.geiss@dataforce.de